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Economist, Department of The Treasury
Announcement Number: 24-12287501A-LBD-0110-13

Co-creator of a method that significantly enhances factory performance by leveraging software for operations monitoring and risk analysis. Evaluator of correlations and forecast outputs to refine risk analysis techniques and optimize processes. Risk manager, making informed decisions to maintain continuity and maximize efficiency. Filed U.S. Federal trademark application for framework used in finance to analyze and optimize investment portfolios. Budget Management: $50M in cashflow. Fluent in English, proficient in Mandarin, basic Spanish.

Country of Citizenship: USA Veteran's Preference: N/A Highest Grade: N/A	Clearance: N/A Work Schedule: Full Time Desired Locations: Miami, FL

QUALIFICATION

Microeconomic Research	Government Barriers	Intangible Products
Microeconomic Analysis	Interest Rates	Competitive Conditions
Economic Structure	Databases	Financial Markets
Competitive Conditions	Tangible Products	Complex Issues

PROFESSIONAL EXPERIENCE

Full Time Graduate Student, 01/01/2023 to 12/31/2024
University of Miami
1306 Stanford Drive, Coral Gables, FL 33146 | 80 hours/week

APPLIED ECONOMIC CONCEPTS, THEORIES, PRINCIPLES AND PRACTICES RELATED TO RESEARCH AND ANALYSES OF VARIETY OF INDUSTRIES: Used macroeconomic indicators to analyze currency fluctuations, acquired insight into global economic policies and its impact on exchange rates and international trade. Applied interest rate parity theory to predict movements in currency pairs, integrated knowledge of differential inflation rates and national monetary policies.

ANALYZED FACTUAL INFORMATION TO DRAW RATIONAL ECONOMIC CONCLUSION: Evaluated economic viability of renewable energy investments under varying economic conditions. Used theoretical frameworks to analyze macroeconomic indicators, such as inflation rates and governmental policy changes. Applied financial modeling techniques to assess the return on investment for solar and wind projects. Considered factors like initial capital expenditure, operational costs, and potential tax incentives. Drew rational economic conclusion that despite higher upfront costs, renewable energy projects could offer competitive returns over the long term.

Planning, Control, & Investment Analyst, 01/01/2022 to 11/01/2022
Gerdau Special Steel North America (GSN)
3000 E Front St, Monroe, MI 48161
Salary: $70,000/year; 40 work hours/week
Supervisor: Marco Auad, 734.243.2446, may be contacted

Joined during budgetary misallocations, inaccurate financial reporting, and lack of oversight on expenditures. Chosen to assist in reducing risk of unauthorized spending and obscured transparency in resource allocation.

Report to: Global Engineering Manager (01/2022 to 06/2022), Engineering Manager (06/2022 to 11/2022)
Budget Management: $50M cashflows (2022) & $45M cashflows (2023)

APPLIED ECONOMIC CONCEPTS, THEORIES, PRINCIPLES AND PRACTICES RELATED TO RESEARCH AND ANALYSES OF A VARIETY OF INDUSTRIES: Evaluated potential investments by applying systematic analysis of opportunities for plant upgrades, new technologies, and projects to improve efficiency. Identified areas within operations to improve through internal audits, stakeholder consultations, and industry research. Identified potential investments, thoroughly evaluated each project, and considered expected returns.

Assessed risks, such as technical feasibility, market conditions, and regulatory factors. Analyzed finances by applying metrics like NPV and IRR with keen focus on time value of money through DCF techniques. Ensured projects aligned with organizational strategic objectives and were coherent with long-term growth strategies. Prioritized projects offering highest potential return while managing levels of risk and resource constraints.

USED ECONOMIC FACTORS RELATED TO PRICING AND VALUATION OF TANGIBLE AND INTANGIBLE PROPERTY AND SERVICES: Used economic factors to decide on project pursuits. Evaluated feasibility of significant plant upgrade to enhance efficiency and expand production capacity. Collaborated with team members to conduct comprehensive analysis of economic indicators relevant to the project. Economic indicators included market demand projections, industry growth rates, and regulatory considerations to gauge its viability within the market context.

Additionally, applied metrics including net present value (NPV) and internal rate of return (IRR) to assess potential returns and risks associated with investment. Integrated economic principles into risk assessment and considered factors, such as technological obsolescence and market volatility. Ensured project's contribution to long-term profitability and market leadership to align with business objectives.

FACTORS AFFECTING TRANSFER PRICING POLICIES BY MULTINATIONAL CORPORATIONS: Observed detailed cost-benefit analyses of capital expenditure (Capex) exchanges between Gerdau Long Steel North America and Gerdau Special Steel North America. Applied observations to large Capex expenses, such as electric transformers, to show how the exchanges could optimize transfer pricing strategies and minimize tax liabilities. Witnessed meticulous evaluation of financial and tax implications of transactions to acquire insight into organizational structuring. Adhered to arm's length principles for financial optimization within the corporation.

Moreover, acquired insight into advantages of negotiating better deals with vendors operating in different parts of the company overseas. Leveraged global partnerships to secure discount packages for vendors resulting in enhanced cost efficiency while aligning with transfer pricing strategies. Impacted bottom line by understanding strategies that comply with internal corporate guidelines and external tax regulations. Navigated transfer pricing within multinational corporate setting.

ANALYZED FACTUAL INFORMATION TO RECOGNIZE AND EVALUATE SIGNIFICANT AND CRITICAL FACTORS: Analyzed multiple capital expenditure (Capex) projects. Reviewed data related to various proposed investments ranging from upgrades in manufacturing equipment to implementation of new technologies. Gathered and analyzed critical information, such as projected costs, expected operational improvements, and estimated return on investment. Analyzed compliance with regulatory standards and potential for tax optimization. Identified and evaluated most significant factors affecting the success and viability of each investment. Applied quantitative assessment of financial metrics and qualitative analysis of project contribution to company's competitive edge and market.

ANALYZED FACTUAL INFORMATION TO SOLVE AN INCREASINGLY COMPLEX PROBLEM: Oversaw financial aspects during company transition from SAP system to Plex. Offered overview of financials by generating expenditure reports and developing dynamic dashboards. Managed process of merging and appending tables to ensure comprehensive data integration. Employed SQL queries and enhanced method of drawing insights from the data to refine the data extraction process. The complexity of this process stemmed from infinite possibilities in data visualization and endless scope of proposed investments. This created challenges that pushed the boundaries of data analysis and financial oversight.

ANALYZED FACTUAL INFORMATION TO PREPARE COMPREHENSIVE REPORTS: Analyzed and reported project data within Planview, adhered to engineering guidelines to facilitate budget authorization. Executed project requiring meticulous data entry to provide macroeconomic perspective on global significance and the necessity of capital expenditure (CapEx).

EXPLAIN AND DEFEND RESEARCH FINDINGS: Encountered situation where a project engineer engaged in fraudulent activities resulting in notable compliance issues with Sarbanes-Oxley (SOX). The malpractice involved creating unaccounted blanks in documents. This significantly compromised the integrity of documentation and reporting processes. Met with another Planview administrator to investigate, identify, and document how the engineer manipulated the system to gain monetary

benefits improperly. Prepared detailed presentation to outline fraudulent activities and demonstrate step by step how they were conducted. Created comprehensive presentation to highlight the issues resulting in successful resolution of the case.

REVIEWING FINANCIAL RECORDS FOR THIS ORGANIZATION: Reviewed and analyzed financial records to support Capex engineering process. Oversaw active and proposed capital investments. Maintained financial integrity of the data procured, reviewed and approved documentation submitted by project coordinators. Validated invoices and managed data entry into the Enterprise Project Management (EPM) "Planview" software and SAP to accurately record commitments and expenditures. Facilitated project spending approvals within engineering department. Coordinated with project coordinators, accounting, and procurement teams to guarantee precise financial tracking and reporting.

INTERVIEWING COMPANY OFFICIALS FOR THIS ORGANIZATION: Collaborated with project coordinators and engineers to prepare presentations for budget approvals by the President. Distilled complex financial data and project insights into persuasive and concise presentations. Highlighted strategic value, financial viability, and potential returns of proposed Capex projects. Emphasized key aspects including cost savings, efficiency improvements, and alignment with long-term corporate goals. Employed both analytical acumen and creative presentation skills to design compelling slides.

REVIEWING COMPARABLE COMPANIES FOR THIS ORGANIZATION: Conducted thorough comparative analyses of companies within steel industry. Benchmarked organization's financial performance and operational efficiency against peers. Identified companies with similar operational scales and strategic objectives. Reviewed their financial metrics, market trends, and industry reports. Provided critical insights into revenue growth, capital expenditure efficiencies, and return on investments.

Considered the impact of market dynamics such as technological advancements and raw material costs. Created detailed report offering comprehensive competitive positioning of organization, highlighted opportunities for operational improvement and strategic growth. Fostered competitive advantage and organizational development.

REVIEWING TRADE JOURNALS CONCERNING THE COMPANY'S INDUSTRY: Reviewed variety of trade journals related to the steel industry and manufacturing sector. Used information to understand external factors impacting operations and financial performance. Acquired insight into emerging technologies in steel production, shifts in global supply and demand, regulatory changes, and competitive strategies to influence organizational strategic direction.

REVIEWING GOVERNMENT DOCUMENTS CONCERNING THE COMPANY'S INDUSTRY: Reviewed government documents related to acquire insight into compliance and regulatory impact on operations. Reviewed documents including laws, regulations, and guidelines issued by government bodies. Focused on the Sarbanes-Oxley Act (SOX) to maintain financial and accounting transparency and integrity within publicly traded companies. Analyzed SOX regulations to ascertain company's adherence to internal controls over financial reporting.

Also, assessed potential risks of non-compliance and identified areas for improvement. Advised on best practices for compliance, contributed to the development of internal policies that align with legal standards, and fostered culture of transparency and accountability within the organization.

FINANCIAL RATIO ANALYSIS: Implemented dynamic historical and projected spend data into Planview program. This led to significant advancement in offering sophisticated financial ratio analysis at a global level. Integrated both historical and forecasted financial data into Planview, enabled a nuanced analysis of financial ratios that considered past performance, current financial status, and future projections.

Facilitated comprehensive view of liquidity, profitability, debt, and efficiency ratios. Analyzed financial ratios from global perspective to assess financial performance and stability across different regions and business units. For instance, trends in return on equity (ROE) and return on assets (ROA) could now be examined in isolation and as part of a broader, multi-year financial strategy.

FUNCTIONAL ANALYSIS: Conducted functional analysis to evaluate and improve operational and financial processes. Assessed functions of different departments and projects to analyze contribution to financial goals, efficiency, and overall performance. Analyzed workflows, identified bottlenecks or inefficiencies, and recommended improvements to enhance functionality and productivity. Collaborated with various teams to optimize processes by ensuring each department's functions were aligned with strategic objectives and financial targets. Analyzed business operations and interplay between different functions to streamline operations and improve financial outcomes.

COST-BENEFIT ANALYSIS: Conducted cost-benefit analyses (CBA) to evaluate capital expenditure (Capex) projects and operational improvements. Quantified and compared expected costs and benefits associated with project proposals or process enhancements. Applied comprehensive approach to incorporate direct financial costs, gains, and indirect effects, such as environmental impact, employee satisfaction, and long-term strategic alignment with company goals.

Gathered detailed cost estimates including initial investment outlays, ongoing operational costs, and potential cost savings or revenue enhancements. Collaborated with cross-functional teams to project benefits. This included tangible benefits like revenue increases and intangible benefits such as improved market positioning or brand reputation.

Used discounted cash flow (DCF) techniques, calculated net present value (NPV) of each project, and ensured time value of money was appropriately considered in long-term projections. Compiled findings into reports and presentations, provided senior management with clear, data-driven insights to inform decision-making.

COMPANY/INDUSTRY RESEARCH: Remained ahead in the industry by conducting internet screening to identify emerging trends. Monitored new technologies and acquired knowledge in global demand shifts due to economic changes. Scanned websites of industry-specific news outlets, forums, and blogs. Analyzed competitors by screening their websites, press releases, and news articles on platforms like Google News. Used information to understand their strategies, new product launches, and market positioning to benchmark company's performance and strategy for future investments.

Used government resources for regulatory compliance and to ensure operations and capital investments complied with environmental regulations and safety standards. Applied grant and subsidy opportunities on projects focused on innovation or environmental sustainability. Searched government portals for financial incentives, grants, or subsidies available to support capital investments in new technologies.

Researched commercial databases to conduct market research. Reviewed subscription-based databases, such as Bloomberg, S&P Global, and IBISWorld to conduct in-depth market analysis, financial data, and forecasts. Evaluated the viability of proposed capital investments and market dynamics.

Used commercial databases to conduct due diligence on potential suppliers and vendors for Capex projects. Assessed financial stability, market reputation, and operational capabilities to ensure project timelines and budgets were met. Conducted detailed analysis of target company's financial health, market share, and operational synergies with organization to select strategic partnerships or acquisitions. Reviewed their annual reports, financial statements, and market performance.

Studied leading company within or outside the steel industry to identify best practices in Capex management, innovation, and operational efficiency. Acquired valuable insights for process improvements and strategic planning. Tailored searches with specific search criteria to investigate new technologies for Capex projects.

Search criteria included: technology maturity, applicability to steel manufacturing, cost-benefit analysis, and integration with existing processes. Conducted searches with specific criteria related to environmental aspects other than sustainability to align with operational goals and compliance requirements.

SEARCHED FOR FUNCTIONAL CONSIDERATION IN SELECTING AND ANALYZING A COMPANY'S INFORMATION: Functional Consideration: Reliability and Geographic Diversification of Suppliers: Assessed suppliers to enhance supply chain resilience, made functional considerations to focus on suppliers' geographic diversification and reliability. Searched for suppliers with multiple manufacturing sites spread across different regions to mitigate risks associated with regional disruptions. Analyzed company information, examined operational footprints using annual reports and industry databases, assessed past performance during supply chain shocks using case studies and news archives.

Prioritized technological advancement and energy efficiency during upgrade of manufacturing equipment. Searched for equipment manufacturers that offered latest technology and met stringent energy efficiency standards. Made comparisons of product specifications, energy consumption data, and user reviews from industry forums and trade publications to assist with evaluating potential vendors. Communicated with vendors to discuss their R&D focus and technology roadmaps.

TECHNIQUES USED TO DETERMINE VALUE: A. Discounted Cash Flow (DCF) - Project Investment Analysis: Evaluated viability of investing in a new manufacturing facility, used discounted cash flow (DCF) method to forecast the facility's cash flows over 10-year horizon. Projected net

cash flows by estimating future cash inflows from product sales and subtracting estimated operational and capital expenditures. Then, discounted results back to present value using the company's weighted average cost of capital (WACC).

B. Internal Rate of Return (IRR) - Evaluated Renewable Energy Project: Calculated internal rate of return (IRR) to install solar panels across operations to consider a shift towards renewable energy sources. Used IRR method to assist with determining the profitability by identifying the discount rate that led to the net present value (NPV) of all cash flows equal to zero. Compared rate against required rate of return to decide if the project aligned with organizational financial goals.

C. Capitalization Techniques - Applied capitalization techniques to assess value of particularly stable and mature business unit within the company. Used unit's expected annual normalized earnings and divided figure by an appropriate capitalization rate derived from industry's average return rate. Used this method as straightforward valuation based on unit's consistent earnings performance.

D. Valuation of Options - Expansion Option Valuation: Used real options valuation to quantify the value of being able to expand operations for a project. Modeled the expansion as a call option, with the cost of expansion as the strike price and the present value of future expanded operations as the underlying asset. Used technique to highlight strategic value embedded in the project.

E. Market Approach - Competitor Transaction Analysis: Analyzed recent transactions of similar companies within industry to determine fair market value of company to prepare for potential merger. Compiled multiples like price-to-earnings (P/E) ratios and enterprise value-to-EBITDA ratios from transactions and applied them to financial metrics.

F. Asset Approach - Liquidation Scenario Valuation: Used asset approach to estimate liquidation value of the company’s assets in strategic review considering the worst-case scenario of business discontinuation. Valued company's tangible assets at current market values, subtracted liabilities, and provided baseline value that could be realized in liquidation scenario.

Analyst-Intern, 11/01/2020 to 04/01/2021
Ducker Carlisle Worldwide
1250 Maplelawn Drive, Troy, MI 48084
Salary: $40,000/year; 40 work hours/week
Supervisor: Richard Hilborn, 800.929.0086, may be contacted

Undergraduate Research Assistant, 09/01/2018 to 05/01/2019
University of Michigan
204 Washtenaw Ave, Ann Arbor, MI 48109
Salary: $10,000/year; 20 work hours/week
Supervisor: Yue Zhou, 734.763.1436, may be contacted

EDUCATION & CERTIFICATION

MASTER OF SCIENCE IN FINANCE, GPA: 3.1/4.0, University of Miami, Coral Gables, FL, 12/2023

BACHELOR OF ARTS IN ECONOMICS, GPA: 3.13/4/0, University of Michigan, Ann Arbor, MI, 04/2020

Bloomberg Market Concepts Certificate, Bloomberg for Education, 03/2020

Technical Skills: Excel, Power BI, Bloomberg, SQL, Python, Stata, Maple, and MATLAB
Excel Proficiency: VLOOKUP and XLOOKUP, INDEX/MATCH, SUMIF, COUNTIF, Pivot Tables, Filters, Slicers, Charts, Macros, Data Simulations, Conditional Formatting, Active-X, VBA, VBA Advanced, Custom Functions, All Analysis Tools in Data Analysis, Solver, What-If Analysis, Power Query, and Proper Power Query Appends

Latest Excel Project Specifics: Credit Default Swap Pricing, Binomial Option Pricing Tree, Portfolio, Portfolio Performance Evaluation, & An Excel Executive Summary on Microsoft, Nvidia, and GameStop

Latest Stata/Python Project Specifics: Gamestop (GME) Technical Analysis: ARMA Model Future Forecasted Prices, Investment Budget Historical Rolling Beta and Alpha, and Short Interest rate projection